

Attorney Cheryl L. Browns (for former Guardian Gloria Cuevas)

Attorney Heather H. Kruthers (for Public Guardian, former Temporary Guardian)

## Probate Status Hearing Re: Report from the Public Guardian

		<p><b>PUBLIC GUARDIAN</b> was appointed Temporary Guardian of the Estate by Minute Order dated 4/27/2016, from a status hearing set for failure of the Guardian of the Estate to file an inventory and appraisal and an accounting.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> <li>Pages 1, 2, and 3 are related siblings' estates.</li> <li>Case file contains proposed letters for issuance to Petitioner upon her picking them up at the Probate Clerk's Office.</li> </ul>
		<p><b>Cont. from 062916</b></p>	<p><b>Letters of Temporary Guardianship issued to the PUBLIC GUARDIAN on 5/5/2016</b>, and expired on <b>6/29/2016</b>.</p>
Aff.Sub.Wit.		<p><b>GLORIA CUEVAS</b>, maternal grandmother, was appointed Guardian of the Person and Estate on 8/11/04. Inventory and appraisal was due January 2005. First account was due September 2005. Letters that were issued to her 9/10/04 have been <b>REVOKED</b>.</p>	<p><b>Continued from 6/29/2016.</b> Minute Order states Gloria Cuevas is to get all mailings if she is represented by an attorney or not. The Court vacates order removing Gloria and reinstates her as guardian of the person and estate. Letters to issue. Public Guardian is discharged. Verified declaration including copy of location of funds is to be filed by 8/24/2016 by the Public Guardian. If documents are filed then no appearances needed.</p>
Verified			
Inventory		<p><b>Notice of Status Hearing set a hearing on 4/27/2016</b>, and was mailed to Cheryl Browns and Gloria Cuevas on 3/22/2016. The mailing for Gloria Cuevas was returned as undeliverable. A second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/2016.</p>	<p><b>Reviewed by:</b> LEG</p>
PTC			
Not.Cred.		<p><b>Minute Order dated 4/27/2016 states:</b> Ms. Browns represents to the Court that she has no knowledge of Gloria Cuevas. Furthermore, she represents that she has no records as she was burglarized in 2007, losing all electronic records. The Court orders Gloria Cuevas removed as Guardian of the Person and Estate forthwith, as she was duly noticed and no actions have been taken in this matter. The Court orders the matter referred to the Department of Social Services/Child Protective Services for CPS to take custody of the minor. The Court appoints the Public Guardian as Temporary Guardian of the Estate until further information can be gathered; Letters are to issue forthwith from the minute order.</p>	<p><b>Reviewed on:</b> 8/25/16</p>
Notice of Hrg			
Aff.Mail		<p><b>Updates:</b></p>	<p><b>Recommendation:</b></p>
Aff.Pub.			
Sp.Ntc.		<p><b>File 1 - Atondo</b></p>	
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

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		<p><b>Cont. from 062916</b></p>	<p><u>Continued from 6/29/2016.</u> Minute Order states Gloria Cuevas is to get all mailings if she is represented by an attorney or not. The Court vacates order removing Gloria and reinstates her as guardian of the person and estate. Letters to issue. Public Guardian is discharged. Verified declaration including copy of location of funds is to be filed by 8/24/2016 by the Public Guardian. If documents are filed then no appearances needed.</p>
Aff.Sub.Wit.		<p><b>Letters of Temporary Guardianship issued to the PUBLIC GUARDIAN on 5/5/2016</b>, and expired on <u>6/29/2016</u>.</p>	<p><b>Reviewed by:</b> LEG</p>
Verified			
Inventory		<p><b>GLORIA CUEVAS</b>, maternal grandmother, was appointed Guardian of the Person and Estate on 8/11/04. Inventory and appraisal was due January 2005. First account was due September 2005. Letters that were issued to her 9/10/04 have been <b>REVOKED</b>.</p>	<p><b>Reviewed on:</b> 8/25/16</p>
PTC			
Not.Cred.		<p><b>Notice of Status Hearing set a hearing on 4/27/2016</b>, and was mailed to Cheryl Browns and Gloria Cuevas on 3/22/2016. The mailing for Gloria Cuevas was returned as undeliverable. A second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/2016.</p>	<p><b>Updates:</b></p>
Notice of Hrg			
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Aff.Pub.			
Sp.Ntc.		<p><b>File 2 - Atondo</b></p>	
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
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**Probate Status Hearing Re: Report from the Public Guardian**

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<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
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<b>Sp.Ntc.</b>			
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<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

**Reviewed by:** LEG

**Reviewed on:** 8/25/16

**Updates:**

**Recommendation:**

**File 3- Moreno**

**4A Ulises Chavez (GUARD/P)****Case No. 09CEPR01014**

Petitioner: Raina Salinas (pro per)

Attorney: Miguel Jimenez (for Guardian Antonio Contreras)

**Petition for Termination of Guardianship**

		RAINA SALINAS, mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>ANTONIO CONTRERAS</b> was appointed guardian on 3/10/10. – <i>personally served on 2/21/16.</i>	<b>Minute order dated 7/19/16 states</b> the Court Spanish interpreter interprets for Mr. Contreras. Service needs to be made to father and grandfather. As of 8/25/16 no new documents have been filed.
Cont. from 042516, 060716, 071916		Please see pleading for details.	1. Need proof of service of the Notice of Hearing or declaration of due diligence on: a. Ulises Chaves (father) – <i>unless court dispenses with notice.</i> b. Filimon Chaves (paternal grandfather)
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<b>Objections to Termination of Guardianship with POS filed by Antonio Contreras on 4/12/16</b>	<b>Note:</b> Minute order dated 3/3/16 modified visitation as follows: Visitation for Raina Salinas, Saturdays at 3 pm to Sundays at 3 pm. Each receiving party is to pick up the minor timely. Ms. Salinas is not to send a third party person to pick the minor up; if she does, she will forfeit that visit. The modified visitation began on 3/5/16.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		<b>Reviewed by:</b> KT
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<b>Court Investigator Report filed on 4/19/16</b>	<b>Reviewed on:</b> 8/25/16
<input type="checkbox"/>	Aff.Mail		<b>Updates:</b>
<input type="checkbox"/>	Aff.Pub.		<b>Recommendation:</b>
<input type="checkbox"/>	Sp.Ntc.		<b>File 4A- Chavez</b>
<input checked="" type="checkbox"/>	Pers.Serv.	W/	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

**4A**

## Petition for Modification of Visitation

		<b>ANTONIO CONTRERAS</b> , Guardian, is petitioner.  Please see petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service of the Notice of Hearing on Raina Salinas (mother)  3. Need Order.  <b>Note:</b> Minute order dated 3/3/16 modified visitation as follows: Visitation for Raina Salinas, Saturdays at 3 pm to Sundays at 3 pm. Each receiving party is to pick up the minor timely. Ms. Salinas is not to send a third party person to pick the minor up; if she does, she will forfeit that visit. The modified visitation began on 3/5/16.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<b>Reviewed by:</b> KT	
			<b>Reviewed on:</b> 8/25/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 4B- Chavez</b>	

**5 Alina Genesis Real Torres, Aiden Real (GUARD/P) Case No. 11CEPR00648**

Petitioner Phillips, Kimberlina R (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person (Non-Competing)

<b>Aiden Age: 5 mos</b>	<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>KIMBERLINA R. PHILLIPS</b> , maternal grandmother, is petitioner.	<b>Note: Petition is as to Aiden Real only. Petitioner, Kimberlina R. Phillips was appointed guardian of Alina Genesis Real Torres on 09/28/2011.</b>
<b>Cont. from 080316</b>	<u>Please see petition for details</u>	<b>Minute Order of 08/03/2016: Examiner notes provided in open court. The Court dispenses with notice as to the unknown father and unknown paternal grandparents; the mother and maternal grandfather must be noticed.</b>
<input type="checkbox"/> Aff.Sub.Wit.		1. Need Notice of Hearing.
✓ Verified		2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice for:
<input type="checkbox"/> Inventory		<ul style="list-style-type: none"><li>Ashley Real (Mother) – Unless the Court dispenses with notice.</li></ul>
<input type="checkbox"/> PTC		<b>Note: Declaration of Due Diligence filed 06/02/2016.</b>
<input type="checkbox"/> Not.Cred.		3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
<input type="checkbox"/> Notice of Hrg	x	<ul style="list-style-type: none"><li>Maternal Grandfather (Unknown)</li></ul>
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
✓ CI Report		
<input type="checkbox"/> 9202		
✓ Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
✓ UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 08/29/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5- Torres/ Real</b>

**Probate Status Hearing Re: First Accounting or Petition for Final Distribution**

<b>DOD: 10/3/1994</b>		<p><b>ROBERT L. JOHNSON</b> was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.</p> <p>Letters issued 7/31/12.</p> <p>I &amp; A filed on 9/11/12 shows an estate valued at \$40,000.00</p> <p><b>Minute order dated 7/31/12</b> set a status hearing on 10/4/13 for the filing of the First Account or Petition for Final Distribution. Minute order indicates Mr. Rindlisbacher was present.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 6/15/16.</b> Minute order states the Court issues an Order to Show Cause. Please see page 6B.</p> <p>1. <b>Need first account, petition for final distribution or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<p><b>Cont. from 100413, 121313, 032814, 072514, 111214, 042215, 060315, 080515, 101415, 120915, 021016, 031616, 050416, 061516</b></p>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
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<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 8/24/16</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 6A- Johnson</b></p>	

## Order to Show Cause

		<p><b>ROBERT L. JOHNSON</b> was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.</p> <p>Letters issued 7/31/12.</p> <p>I &amp; A filed on 9/11/12 shows an estate valued at \$40,000.00.</p> <p><b>Minute Order dated 6/15/16</b> set this Order to Show Cause to Robert Johnson as to why he should not be removed as Administrator for his failure to file a final distribution petition. Mr. Johnson is ordered to be personally present in court. – Copy of the Minute Order was mailed to Robert Johnson on 6/15/16.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 8/24/16	
		Updates:	
		Recommendation:	
		File 6B- Johnson	





Attorney  
Attorney

Kruthers, Heather H. (for Public Administrator)  
Flanigan, Philip M. (for Former Administrator Debra Giuffrida)

**Status RE: Status of the Estate (Filing of First or Final Account)**

<b>DOD: 11/29/14</b>	<b>DEBRA GIUFFRIDA</b> , Daughter, was appointed Administrator with Full IAEA without bond on 4/1/15. Letters issued 4/2/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</b>
	At the hearing on 4/1/15, the Court set a status hearing for 6/1/16 for the filing of the first or final account.	
<b>Aff.Sub.Wit.</b>	On 8/3/15, Ms. Giuffrida filed a Final Inventory and Appraisal reflecting a total estate value of \$194,258.78 consisting of residential real property, a vehicle, and a secured promissory note.	<b>Reviewed by:</b> skc <b>Reviewed on:</b> 8/24/16 <b>Updates:</b> <b>Recommendation:</b> <b>File 8- Couch</b>
<b>Verified</b>	At status hearing re the filing of the First or Final Account on 6/1/16, counsel requested additional time and the Court ordered Ms. Giuffrida to appear at the next hearing on 6/15/16 and provide proof that proceeds of the sale of the real property had been placed into an estate account.	
<b>Inventory</b>	On 6/15/16, Ms. Giuffrida appeared via CourtCall. The Court removed Ms. Giuffrida and appointed the <b>FRESNO COUNTY PUBLIC ADMINISTRATOR</b> , and ordered Ms. Giuffrida to provide the PA with any and all information re money from the estate that was spent. The minute order states the PA may need to address any legal action that may be necessary against Ms. Giuffrida.	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
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<b>Video Receipt</b>		
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<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>	<b>Declaration of Philip M. Flanigan filed 8/23/16</b> states his office mailed the original file to Attorney Kruthers on 6/17/16. They have not had any communication with the assigned Public Administrator. His office has been in contact with Ms. Giuffrida, and she stated her disability hearing was cancelled due to an AC malfunction and rescheduled for 8/31/16.	
<b>UCCJEA</b>	<b>Status Report filed 8/26/16 by the Public Administrator</b> states a letter was sent to a PO Box in Clovis and to the last known address in Henderson, NV, trying to locate the previous administrator Debra Gluffrida, but no response has been received.	
<b>Citation</b>		
<b>FTB Notice</b>		

Attorney

Attorney

Attorney

Janet L. Wright (for Petitioner Juanita Bennett, spouse)  
 William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)  
 Kurt F. Vote; Scott D. Laird; Dylan J. Crobby, for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)

Petition for Payment of Family Allowance

DOD: 6/26/2015		<p><b>JUANITA BENNETT</b>, surviving spouse, is Petitioner.</p> <p><b>Petitioner requests a family allowance of \$43,000.00 per month from the estate, based upon the following:</b></p> <ul style="list-style-type: none"> <li>Decedent died on 6/26/2015 and Letters Testamentary were issued to <b>G. DANA FRENCH</b> as Executor on 10/7/2015;</li> <li>The Final Inventory and Appraisal was filed on 11/20/2015, showing the estate value as <b>\$9,920,343.58</b>; at the time of Decedent's death, he held substantial assets in his revocable trust, the <b>C.J. BENNETT FAMILY TRUST of 1987</b>;</li> <li>The period for filing creditor's claims expired on 2/7/2016;</li> <li>Decedent is survived by Petitioner and his 3 adult children: <b>ALYSA BENNET DJANIKIAN</b>, <b>FRANK HENRY BENNETT, II</b>, and <b>SCOTT FORREST BENNETT</b>;</li> <li>Petitioner is the only individual entitled to a family allowance in the estate;</li> <li>It is a well-established legal principal that the purpose of a family allowance is to continue, during settlement of the estate, the support of the surviving spouse at the standard of living that the surviving spouse was maintaining during the Decedent's life;</li> <li>During Decedent's life, he and Petitioner maintained a high standard of living, regularly using 3 residences, located in Fresno, Carmel, and Newport Beach, California;</li> <li>Although legal title to the residences was held in Petitioner's revocable living trust, during their marriage, the cost of maintaining the residences was paid by Decedent from his accounts identified as his separate property in the <b>BENNETT FAMILY TRUST</b>;</li> </ul> <p><i>~Please see additional page~</i></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Page 9B</u> is a <i>Probate Status Hearing Re: Setting of a Contested Hearing</i>.</p> <p><u>Continued from 5/25/2016.</u></p> <p><b>Note:</b> Probate Status Hearing for filing of the first and/or final account is set on <u>11/30/2016</u>.</p>	
Cont. from 052516				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
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	Letters			
	Duties/Supp			
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✓	Order			
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	UCCJEA			
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	FTB Notice			

Reviewed by: LEG
Reviewed on: 8/29/16
Updates:
Recommendation:
File 9A- Bennett

Petitioner states, continued:

- Furthermore, it was the Decedent's intention that the maintenance expenses were to continue to be made from his separate property accounts for as long as permitted;
- In furtherance of this intention, Decedent provided in the **BENNETT FAMILY TRUST** specifically for payment of the residential expenses at the 3 residences as well as Petitioner's living expenses during Decedent's incapacity [*citation of Trust terms omitted; brief sum: Decedent expects his Disability Trustee to continue to pay all of Juanita's living expenses and operating expenses for all 3 of Juanita's residences*];
- The Disability Trustee of the **BENNETT FAMILY TRUST** was given the authority "to determine a monthly allowance...to be sufficient to pay Juanita's living expenses and sufficient to pay the operating expenses for Juanita's 3 residences in an amount consist with past expenditures...." (*copy of Trust excerpt "Provide for my Spouse" attached as Exhibit A*);
- Petitioner believes that Decedent intended to have his estate continue to support Petitioner, including the maintenance of these residences for as long as reasonably necessary after his death;
- The average monthly expenses of Petitioner with regard to the 3 residences is **\$15,694.00** (*total monthly expenses itemization attached as Exhibit B*); the average monthly expenses of Petitioner separate from the cost of residence maintenance, including estimated attorney's fees, which Petitioner contends is a reasonable expense under the circumstances, is **\$36,965.00**; the total average monthly expenses and operating expenses for the residences is **\$52,659.00** (*see Exhibit B*);
- Estimated attorney's fees are a reasonable monthly expense, as Petitioner was required to engage independent legal counsel in order to protect her interest in the estate; prior to Decedent's death, Petitioner's legal counsel was Dana French, the Executor and Successor Trustee of the **BENNETT FAMILY TRUST**;
- It is a well-established legal principal that Petitioner may not be denied her right to a family allowance merely because she has other income and assets;
- Since the Court in its discretion can take into account available income in determining the appropriate amount of the family allowance, Petitioner's average monthly income is **\$9,635.00** (*summary attached as Exhibit C*); Petitioner's shortfall between income and expenses is **\$43,000.00** (*summary attached as Exhibit D*);
- Petitioner believes that a family allowance in the amount of **\$43,000.00** per month from the estate is reasonable and necessary for the maintenance of Petitioner according to her circumstances;
- Petitioner requests that this Order be made retroactive to 6/26/2015, the date of Decedent's death, and that payment of family allowance to Petitioner continue for **1 year** from the date of execution of its Order on this Petition.

**Amendment to Petition for Payment of Family Allowance filed 5/11/2016 states:**

- Just prior to filing her *Petition for Payment of Family Allowance*, Petitioner was advised by **CURTIS WONG, CPA**, that she would owe gift tax for gifts made in 2015 prior to Decedent's death and with Decedent's encouragement;
- Petitioner continued to gather information from Mr. Wong in order to confirm the extent, if any, of her federal gift tax liability not covered by her unified credit;
- It was confirmed by Mr. Wong that Petitioner would be required to pay gift tax liability of **\$1,166,400.00** on or before 4/18/2016 in order to avoid interest and penalties;

~Please see additional page~

**Amendment to Petition for Payment of Family Allowance filed 5/11/2016, continued:**

- Petitioner paid the tax liability on 4/18/2016, and as a result of this payment, Petitioner has an additional expense of **\$1,682,400.00** and amends the *Petition* to reflect this additional required expenditure;
- The gift tax payment was required due to the fact that Decedent's personal gifting from as early as 2004 had been reported as split gifting, thus utilizing Petitioner's federal unified credit to accomplish Decedent's lifetime gifting goals;
- All gifts made by Petitioner in 2015 were made prior to the death of the Decedent with Decedent's encouragement and assurance that Petitioner would not be required to make any payment;
- Petitioner's assets are comprised primarily of her residential real properties used by Petitioner and Decedent as residences prior to his death;
- Petitioner's security portfolio generates income which she uses to pay her living expenses, including the maintenance expenses for her residences;
- Petitioner's shortfall between income and expenses is substantial, requiring her to liquidate and use principal proceeds from the portfolio account to supplement her income in order to meet expenses;
- The unanticipated and unexpected requirement to pay **\$1,166,400.00** in gift tax liability has required petitioner to liquidate even more of her principal accounts, thus creating an additional strain on her personal assets and her cash flow;
- In addition, Petitioner amends her *Petition* to request payment in an amount sufficient to pay the income tax incurred as a result of the receipt of family allowance payments, calculated in a manner that takes into account the need to gross up the payment to account for the income tax attributable to the receipt of the income tax payment;
- Until the amount of family allowance is finally determined, Petitioner is unable to provide the specific amount necessary.

**Petitioner requests this Court Order:**

1. That Dana French as Executor is authorized and directed to pay to Petitioner from the income and/or principal of the estate the sum of **\$43,000.00** per month in monthly installments, beginning on 6/26/2016, and to continue to make such monthly payments for a **1-year** period from the date of execution of the Order on this *Petition*; and
2. That within 30 days of the date of execution of the Order on this *Petition*, Dana French as Executor is authorized and directed to pay to Petitioner from the income and/or principal of the estate the sum of **\$1,682,400.00** from income and/or principal of the estate, representing:
  - a. **\$516,000.00** as retroactive payment for the 12 months of payments due between the date of Decedent's death and 6/26/2016; and
  - b. **\$1,166,400.00** as reimbursement for gift tax liability paid; and
3. That Dana French as Executor is authorized and directed to pay to Petitioner from the income and/or principal of the estate the amount necessary to pay the total income tax liability attributable to her receipt of the family allowance, including the tax liability on the receipt of the payment for income tax liability, in order that Petitioner receive her family allowance payment net after tax.

**~Please see additional page~**

**Verified Objection to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/13/2016 states:**

- *[Specific paragraphs are admitted, denied, or are stated as allegations Respondent is without knowledge or information sufficient to form a belief as to the truth of the allegations, and on that basis are denied; portions of Objection follow];*
- Respondent admits that the quoted language appears in the **BENNETT FAMILY TRUST**, however the quotation is incomplete, out of context, and irrelevant to the issues of the case;
- **First Affirmative Defense:** Petition fails to state facts sufficient to establish the need for an allowance necessary for the Petitioner's maintenance;
- **Second Affirmative Defense:** Petition is fatally defective in that it is vague, ambiguous, and uncertain;
- **Third Affirmative Defense:** Petitioner is barred in whole or in part from seeking the relief set forth in the Petition by the doctrine of unclean hands;
- **Fourth Affirmative Defense:** Petitioner has failed to present satisfactory evidence supporting the allowance Petitioner claims is reasonably necessary to maintain her lifestyle;
- **Fifth Affirmative Defense:** An allowance is not necessary because Petitioner's personal assets and income greatly exceed the amount necessary for Petitioner's maintenance;
- **Sixth Affirmative Defense:** Petitioner's untimely requested allowance is grossly excessive;
- **Seventh Affirmative Defense:** Petition fails to set out Petitioner's claims with sufficient particularity to permit the Respondent to raise all appropriate defenses and Respondent reserves the right to add additional defenses if and when the factual bases for these claims are ascertained.

**The Estate prays for judgment against Petitioner that: Petitioner takes nothing by way of her Petition and that the Petition be dismissed with prejudice; and for attorney's fees and costs of suit.**

**Request for Judicial Notice in Support of Verified Objection to Petition for Payment of Family Allowance filed 5/13/2016 consists of Exhibit A through Exhibit S; summary list as follows:**

1. Petitioner's Creditor Claims filed on February 4, 2016, Fresno County Superior Court Case No. 15CEPR00816, true and correct copies of which is attached as Exhibits "A-C."
2. Inventory and Appraisal Filed on November 20, 2015, Fresno County Superior Court Case No. 15CEPR00816, a true and correct copy of which is attached as Exhibit "D."
3. Linn Energy Holdings, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60039, a true and correct copy of which is attached as Exhibit "E."
4. Linn Energy, LLC's "Voluntary Petition for Non—Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16—60040, "a true and correct copy of which is attached as Exhibit "F."
5. Berry Petroleum Company, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60041, a true and correct copy of which is attached as Exhibit "G."
6. LinnCo, LLC's "Voluntary Petition for Non—Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16—60042, a true and correct copy of which is attached as Exhibit "H."

**~Please see additional page~**

**Dept. 303, 9:00 a.m. Wednesday, August 31, 2016**

***Request for Judicial Notice in Support of Verified Objection, Exhibit list continued:***

7. Linn Acquisition Company, LLC's "Voluntary Petition for Non- Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16—60043, a true and correct copy of which is attached as Exhibit "I."
8. Linn Energy Finance Corp's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16—60044, a true and correct copy of which is attached as Exhibit "J."
9. Linn Exploration & Production Michigan LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60045, a true and correct copy of which is attached as Exhibit "K."
10. Linn Exploration Midcontinent, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60046, a true and correct copy of which is attached as Exhibit "L."
11. Linn Midstream, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60047, a true and correct copy of which is attached as Exhibit "M."
12. Linn Midwest Energy, LLC's "Voluntary Petition for Non—Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16—60048, a true and correct copy of which is attached as Exhibit "N."
13. Linn Operating, Inc.'s "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60049, a true and correct copy of which is attached as Exhibit "O."
14. Mid-Continent I, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60050, a true and correct copy of which is attached as Exhibit "P."
15. Mid Continent II, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas Case No. 16-60051, a true and correct copy of which is attached as Exhibit "Q."
16. Mid-Continent Holdings 1, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60052, a true and correct copy of which is attached as Exhibit "R."
17. Mid-Continent Holdings II, LLC's "Voluntary Petition for Non-Individual Filing For Bankruptcy" filed on May 11, 2016, United States Bankruptcy Court for the Southern District of Texas, Case No. 16-60053, a true and correct copy of which is attached as Exhibit "S."

***~Please see additional page~***

**Verified Objection to Amendment to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/20/2016 states:**

- *[Specific paragraphs are admitted, denied, or are stated as allegations Respondent is without knowledge or information sufficient to form a belief as to the truth of the allegations, and on that basis are denied; portions of Objection follow];*
- **First Affirmative Defense:** Petition fails to state facts sufficient to establish the need for an allowance necessary for the Petitioner's maintenance;
- **Second Affirmative Defense:** Petition is fatally defective in that it is vague, ambiguous, and uncertain;
- **Third Affirmative Defense:** Petitioner is barred in whole or in part from seeking the relief set forth in the Petition by the doctrine of unclean hands;
- **Fourth Affirmative Defense:** Petitioner has failed to present satisfactory evidence supporting the allowance Petitioner claims is reasonably necessary to maintain her lifestyle;
- **Fifth Affirmative Defense:** An allowance is not necessary because Petitioner's personal assets and income greatly exceed the amount necessary for Petitioner's maintenance;
- **Sixth Affirmative Defense:** Petitioner's untimely requested allowance is grossly excessive;
- **Seventh Affirmative Defense:** Petition fails to set out Petitioner's claims with sufficient particularity to permit the Respondent to raise all appropriate defenses and Respondent reserves the right to add additional defenses if and when the factual bases for these claims are ascertained.

**The Estate prays for judgment against Petitioner that: Petitioner takes nothing by way of her *Petition* and that the *Petition* be dismissed with prejudice; and for attorney's fees and costs of suit.**

***Memorandum of Points and Authorities in Support of Verified Objection to Amendment to Petition for Payment of Family Allowance was filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/20/2016.***



Attorney Janet L. Wright (for Petitioner Juanita Bennett, spouse)  
 Attorney William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)  
 Attorney Kurt F. Vote; Scott D. Laird; Dylan J. Crobby (for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)

**Probate Status Hearing Re: Setting of a Contested Hearing**

<b>DOD: 6/26/2015</b>	<b>JUANITA BENNETT</b> , surviving spouse filed a <i>Petition for Payment of Family Allowance</i> on 4/12/2016, with an <i>Amendment to Petition</i> filed 5/11/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need verified status report from counsel for the opposing parties, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing, a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties.
<b>Cont. from</b>	<b>G. DANA FRENCH</b> , Executor of the Estate, filed a <i>Verified Objection to Petition for Payment of Family Allowance</i> on 5/13/2015, and a <i>Verified Objection to Amendment to Petition</i> on 5/20/2016.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	X	
<b>Aff.Mail</b>	X	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202 Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>	X	
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 8/29/16 <b>Updates:</b> <b>Recommendation:</b> <b>File 9B- Bennett</b>

Attorney Heather H. Kruthers (for Petitioner Public Guardian)  
 Attorney Deborah K. Boyett (Court-appointed for Conservatee)  
 Attorney Elizabeth H. Kim, of Stockton (for Diane Varao, daughter)

**Petition for Court's Confirmation of Conservatee's Current Placement**

		<b>PUBLIC GUARDIAN</b> , Conservator of the Estate appointed on 10/1/2015 and Conservator of the Person appointed on 11/12/2015, is Petitioner.  <p align="center">~Please see Petition for details~</p> <b>Objection to Petition for Court's Confirmation of Conservatee's Current Placement filed by DIANE VARAO, daughter, on 7/8/2016.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Continued from 7/13/2016.</b></u> Minute Order states Ms. Madrigal is to remain at the current placement.  <b>Note:</b> Minute Order dated 11/12/2015 from the hearing on the petition for appointment of conservator states, in pertinent part: The Court finds substantial disharmony and disagreement in the family with regard to the care of Maria Madrigal and appoints the Public Guardian as Conservator of the Person. Letters are to issue forthwith from the minute order. The Court orders that Maria Madrigal is to remain at Anita Juarez's home and not be placed into a facility without a properly noticed hearing and Court approval.	
Cont. from 071316				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
✓	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<b>Reviewed by:</b> LEG		
		<b>Reviewed on:</b> 8/29/16		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 10- Madrigal</b>		



First and Final Account and Report of Executor and Petition for Settlement Thereof; for Allowance of Compensation for Ordinary Services; for Reimbursement of Costs Advanced; and for Final Distribution

DOD: 8/5/15		<b>BARBARA P. WORREL</b> , Executor with Full IAEA without bond, is Petitioner.  <b>Account period: 8/5/15 – 7/5/16</b> Accounting:       \$327,333.70 Beginning POH:   \$321,763.45 Ending POH:       \$324,577.52  Executor (Statutory): \$9,546.67  Attorney (Statutory): \$9,546.67  Costs: \$1,386.50 (filing, publication, certified letters)  Closing: \$1,500.00  Distribution pursuant to intestate succession:  Barbara P. Worrel: 50% (\$151,298.84) Robert Craig Pople: 50% (\$151,298.84)	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 8/24/16	
		Updates: 8/26/16; 8/29/16	
		Recommendation: SUBMITTED	
		File 12- Griffin	

Petition for Appointment of Probate Conservator of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
Cont. from 030216, 041316, 042016, 051816, 062216, 080316			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			<p>Court Investigator advised rights on 2/22/16</p> <p>Voting rights affected – need minute order</p> <p><u>Minute Order 8/3/16</u>: Examiner notes provided in open court. Petitioner will speak with the physician regarding the dementia medications.</p> <p><u>Update</u>: On 8/24/16, Petitioner filed a further Capacity Declaration.</p> <p>(Note cleared.)</p>
			Reviewed by: skc
			Reviewed on: 8/24/16
			Updates: 8/26/16
			Recommendation:
			File 13- Rosales

Petitioner Mee Saephan (Pro Per, mother)

## Petition for Appointment of Guardian of the Estate

NO TEMPORARY REQUESTED		NEEDS/PROBLEMS/COMMENTS:
<b>MEE SAEPHAN</b> , mother, is Petitioner and requests appointment as Guardian of the Estate.		<b>Continued from 6/22/2016.</b>
<b>Estimated Value of the Estate:</b> <b>Not provided</b>		<b>The following issues from the last hearing remain:</b>
Cont. from 033016, 051116, 062216		1. Local Rule 7.8.1(l) provides that absent a showing of good cause, it is the policy of the Court to block all funds in guardianship estates. Need from the Petitioner the following:
Aff.Sub.Wit.		(a) The specific amount of funds to be deposited,;
✓ Verified		(b) The name and address of the financial institution at which the funds will be deposited into a blocked account.
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
<p><b>Father: DION HENRY NUNEZ, JR., Deceased.</b></p> <p>Paternal grandfather: Dion H. Nunez, Sr.; <i>personally served 6/7/2016.</i>  Paternal grandmother: Yolanda Zavala; <i>personally served 6/7/2016.</i>  Maternal grandfather: Tonwa Saephan; <i>personally served 6/7/2016.</i>  Maternal grandmother: Chor Saephan; <i>Deceased.</i></p> <p><b>Petitioner states</b> the child's father is deceased, and the father's life insurance company is requesting a guardianship of the child's estate in order to distribute the insurance funds. Petitioner states she is the sole provider for the child's well-being and all of his needs.</p>		<p><b>Note Re Value of the Guardianship Estate:</b>  Petitioner filed on 4/20/2016 a Declaration stating the life insurance company needs more time to investigate and they are unable to determine the amount of the insurance. Attached copy of Prudential Insurance Company letter dated 4/6/2016 states Prudential is unable to render a determination because the entire claim file has been referred to their Special Investigation Unit (SIU) to conduct a contestable investigation five years back from the evidence of insurability application date of 10/23/2014. Prudential anticipates making a determination on this claim within <b>30 days</b> [from 4/6/2016.] If they are unable to make a determination within this time period, they will advise the Petitioner in writing.</p> <p><b>~Please see additional page~</b></p>
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 8/29/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14- Nunez</b>

NEEDS/PROBLEMS/COMMENTS, continued:

Notes Re Orders and Status Hearings:

- Proposed *Order Appointing Guardian of Minor* has been altered at Item 9(c) to specifically reflect that deposits of *all life insurance funds consisting of \$[Need dollar amount]* will be placed in a blocked account at a financial institution to be identified and provided to the Court by the Petitioner.
- Proposed *Order to Deposit Money into Blocked Account* has been prepared and placed in the file for the Court's signature, which requires insertion of the specific amount of money that Petitioner anticipates to receive and deposit into the blocked account.
- Blank copy of a *Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account* (Judicial Council form MC-356) has been placed in the file for the Petitioner's use. Petitioner must file this receipt with the Court within 15 days of the deposit into the blocked account.
- If *Petition* is granted, the Court will set the following status hearings:
  - **Monday, October 3, 2016, at 9:00 a.m. in Dept. 303 for filing receipt of funds in blocked accounts; (The *Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account*, Judicial Council form MC-356, is required to be filed with the Court within 15 days after deposit.)**
  - **Monday, January 23, 2017, at 9:00 a.m. in Dept. 303 for the filing of the inventory and appraisal; and**
  - **Monday, October 30, 2017, at 9:00 a.m. in Dept. 303 for the filing of the first account of the guardianship estate.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

Petition to Determine Succession to Real Property

DOD: 3/7/16		<p><b>MICHELLE DE LA CERDA, STACEY PIPES, RODGER WHITLEY, ROBERT WHITLEY, and NANCY DOWELL</b>, children and step-children, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&amp;A: \$115,000.00 (real property located at 2117 W. Dayton, Fresno, CA 93705)</p> <p>Will dated 1/21/14 devises the estate to decedent's children and step-children who survive him.</p> <p>Petitioners request Court determination that the real property passes to them pursuant to decedent's will in 20% interests each.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
Cont. from 080316				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 8/24/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 15- McEver</b></p>				



# 16 Heaven Johnson, Alea Johnson (GUARD/P) Case No. 16CEPR00687

Petitioner Coleman, William Richard (Pro Per – Maternal Grandfather – Petitioner)  
 Petitioner Coleman, Clara Agnes (Pro Per – Maternal Step-Grandmother – Petitioner)

## Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<b>Minute Order 7/14/16 (Temp):</b>
			The Court orders that there shall be no visits for either parent until they appear before the court. Petitioners are to continue trying to serve the mother.
			1. Petitioners filed an Affidavit of Unsuccessful Service indicating three attempts by the Sheriff to serve the mother at her home address.
			If diligence is not found, need service per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> further diligence on Heather Lynn Johnson (Mother).
			2. Need proof of service of Notice of Hearing with a copy of the petition per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:
			- Paternal Grandfather Robert Lee Johnson, Jr.
			- Maternal Grandmother (not listed)
			Reviewed by: skc
			Reviewed on: 8/24/16
			Updates:
			Recommendation:
			File 16- Johnson

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
✓	Clearances	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

Attorney Nikole E. Cunningham (for Petitioners Jake Gallinetti and Kathryn Gallinetti)

## Amended Petition for Appointment of Conservator of the Person

		<p><b>TEMPORARY GRANTED EX PARTE EXPIRES</b> 7/12/2016, extended to 8/10/2016; extended to 8/31/2016</p> <p><b>JAKE GALLINETTI and KATHRYN GALLINETTI</b> parents, are Petitioners and request appointment as Co-Conservators of the Person.</p> <p><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report filed 7/28/2016.</p>	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 081016				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
✓	Video Receipt			
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
✓	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 8/29/16	
			Updates:	
			Recommendation:	
			File 17- Gallinetti	

Petition for Letters of Administration and Authorization to Administer under the IAEA

<b>DOD: 10/24/15</b>		<b>KATHY RAYE KROG</b> , Daughter, is Petitioner and requests appointment as Administrator with Full IAEA without bond.  All heirs waive bond.  Full IAEA – ok  Decedent died intestate  Residence: Fresno Publication: Business Journal  Estimated value of estate: Real property: \$250,000.00  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court will set status hearings as follows:  <ul style="list-style-type: none"> <li>Wednesday, February 1, 2017 for filing Inventory and Appraisal</li> <li>Wednesday, November 1, 2017 for filing the first or final account</li> </ul>	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			
✓	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 8/24/16
<b>Updates:</b>
<b>Recommendation:</b> SUBMITTED
<b>File 18- Adams</b>

**19 Juliet Chanda Hoke (CONS/P)****Case No. 16CEPR00763**

Petitioner: Christopher Lee Hoke (pro per)

Petitioner: Lisa Brigitte Hoke (pro per)

**Petition for Appointment of Probate Conservator of the Person**

			<b>TEMPORARY GRANTED</b> (for insurance coverage only) <b>EXPIRES 8/31/2016</b>  <b>CHRISTOPHER LEE HOKE and LISA BRIGETTE HOKE</b> , parents, are Petitioners and request appointment as Co-Conservators of the Person.  Please see petition for details.  <b>Court Investigator Report filed on 8/25/2016</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Video Viewing Receipt for both petitioners.
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>	W/		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input checked="" type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input checked="" type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> KT	
			<b>Reviewed on:</b> 8/26/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 19- Hoke</b>	

Petitioner

Stephenson, Travis John (Pro Per – Paternal Great-Uncle – Petitioner)

Petitioner

Perez, Richard Tony (Pro Per – Paternal Great-Uncle – Petitioner)

## Petition for Appointment of Temporary Guardian of the Person

See petition for details.			<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Xavier Atkinson (Father) - Carmelita Perez Bernal (Mother)
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8/25/16
			Updates:
			Recommendation:
			File 20- Atkinson

Probate Status Hearing Re: Filing of the Annual or Biennial Account

			<b>PATRICK KELLY WOLFE</b> , Son, was appointed Conservator of the Estate without bond on 6/15/15. Letters issued 8/5/15.  On 2/29/16, the Court set this status hearing for the filing of the first account pursuant to Probate Code §2620 and sent Notice of Status Hearing to the Conservator Patrick Kelly Wolfe.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>Note:</u> This matter is set for 8:30 am in Dept. 54.</b>  1. Need first account current pursuant to Probate Code §2620 or written status report pursuant to Local Rule 7.5.
	<b>Aff.Sub.Wit.</b>			
	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>			
	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
				<b>Reviewed by:</b> skc
				<b>Reviewed on:</b> 8/24/16
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 1- Chooljian</b>